

AARP Tax Aide Recruitment Web System User Manual

Version 1.0

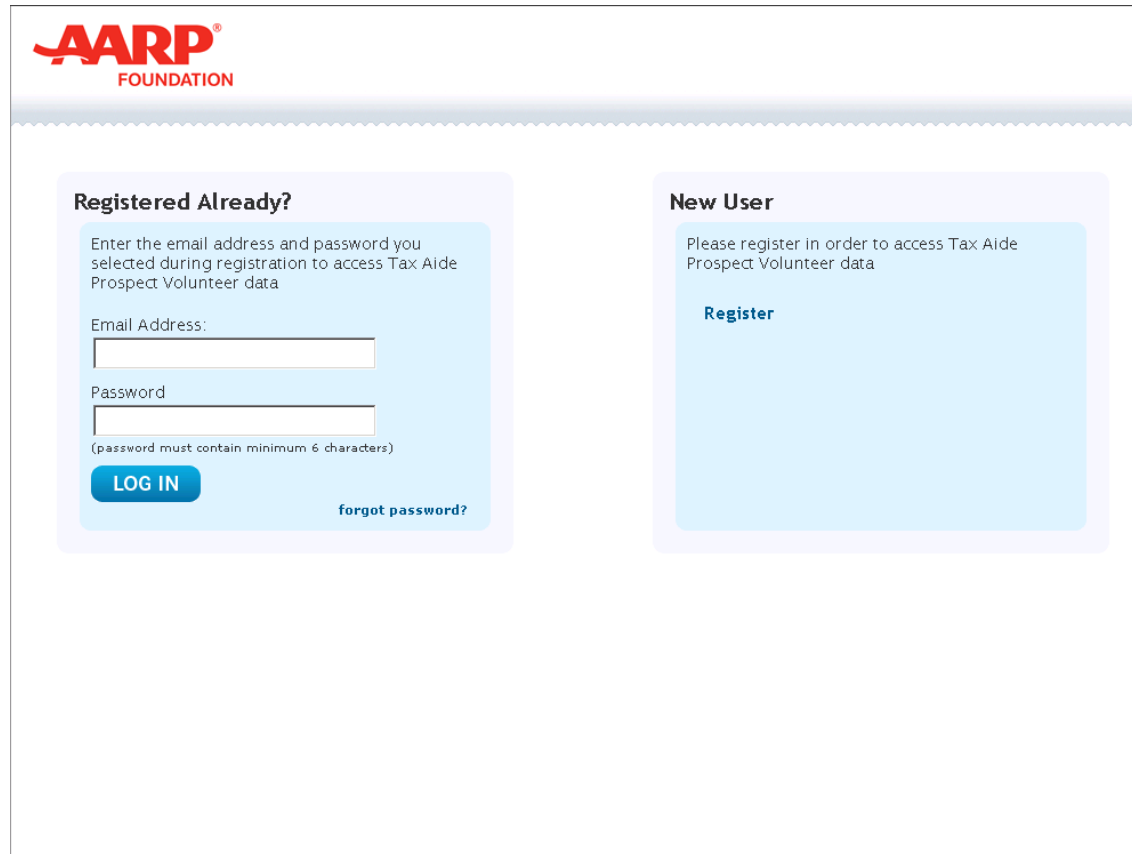
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1.0 Login to the Recruitment (internet)

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 1) will be displayed.

Screen 1:



The screenshot shows the AARP Foundation website's login and registration interface. At the top left is the AARP FOUNDATION logo. Below it, there are two main sections: "Registered Already?" and "New User".

Registered Already?

Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data

Email Address:

Password

(password must contain minimum 6 characters)

LOG IN

[forgot password?](#)

New User

Please register in order to access Tax Aide Prospect Volunteer data

Register

If Registered Already: Enter valid email address and password in the login window.
Note: please use the same email address and password created in the registration process.

Screen 2:



Logged in as: Ronica Krishnan | [Log out](#)

CONFIDENTIALITY AND PRIVACY POLICY

In accordance with AARP policy, use of this application and data is restricted. Only AARP Tax Aide volunteers and other system users who have a legitimate job-related need to use VMIS information, files or records are authorized to access such information. It is a violation of AARP Policy to access, use, duplicate, alter, or disclose AARP information for reasons not related to job duties and without appropriate authorization. Use of this system can and may be monitored.

I AGREE

CANCEL

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Trusted sites

Clicking “Cancel” will take the user back to the Login screen. If the user clicks on “I Agree” the following recruitment main page (**Screen 3**) will be displayed:

Screen 3:



Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

i Split State: **VA1**

State Coordinator **Arthur Welch**

State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**

ADS Email: **rfe001@gmail.com**

PVC: **Joyce Blanton**

PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.

To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status:

[Print Prospective Volunteers List](#)

Name	Phone	Email	i Submitted On	i Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7890	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

Trusted sites

2.0 Volunteer Registration to access Recruitment (internet)

If not registered:

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 4) will be displayed.

Please click on “Register” link from the login screen.

Screen 4:

AARP[®]
FOUNDATION

Registered Already?

Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data

Email Address:

Password

(password must contain minimum 6 characters)

LOG IN

[forgot password?](#)

New User

Please register in order to access Tax Aide Prospect Volunteer data

Register

The below registration screen (Screen 5) is displayed once the Register link is selected

Screen 5:

The image shows a web registration form for the AARP Foundation. At the top left is the AARP Foundation logo. The main heading is "Sign up to access AARP Tax Aide Prospective volunteer information". A legend indicates that an asterisk (*) denotes required fields. The form contains the following fields: First Name, Last Name, Email Address, Password (with a note: "Minimum of 6 characters and should have at least one numeric character"), Confirm Password, Birthday (with a note: "(mm/dd/yyyy)"), Zip Code, and Volunteer ID. Below these fields is a checkbox for "Yes, I agree to the AARP's Terms of Service and Privacy Policy." At the bottom are two buttons: "SIGN UP" and "CANCEL". The footer of the page reads "Copyright 1995-2009, AARP. All rights reserved."

AARP
FOUNDATION

Sign up to access AARP Tax Aide Prospective volunteer information

* = required

* First Name:

* Last Name:

* Email Address:

* Password:
(Minimum of 6 characters and should have at least one numeric character)

* Confirm Password:

* Birthday: (mm/dd/yyyy)

* Zip Code:

* Volunteer ID:

☐ Yes, I agree to the AARP's Terms of Service and Privacy Policy.

SIGN UP **CANCEL**

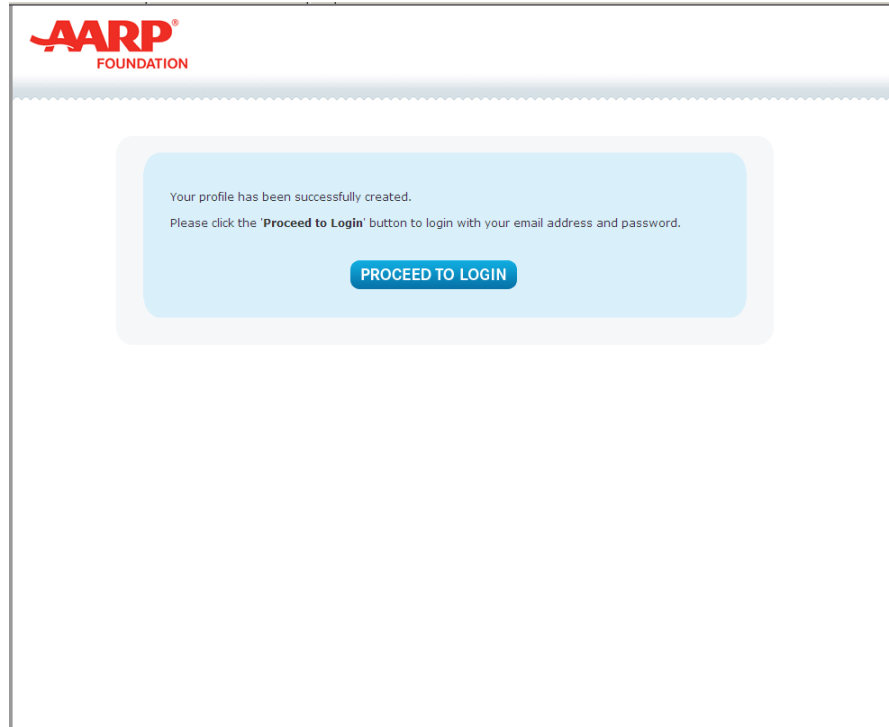
Copyright 1995-2009, AARP. All rights reserved.

User must enter all mandatory fields to proceed and click Sign Up button when done.

Note: The user must be the following roles to view their recruitment application

- DC
- ADS
- PVC
- SC

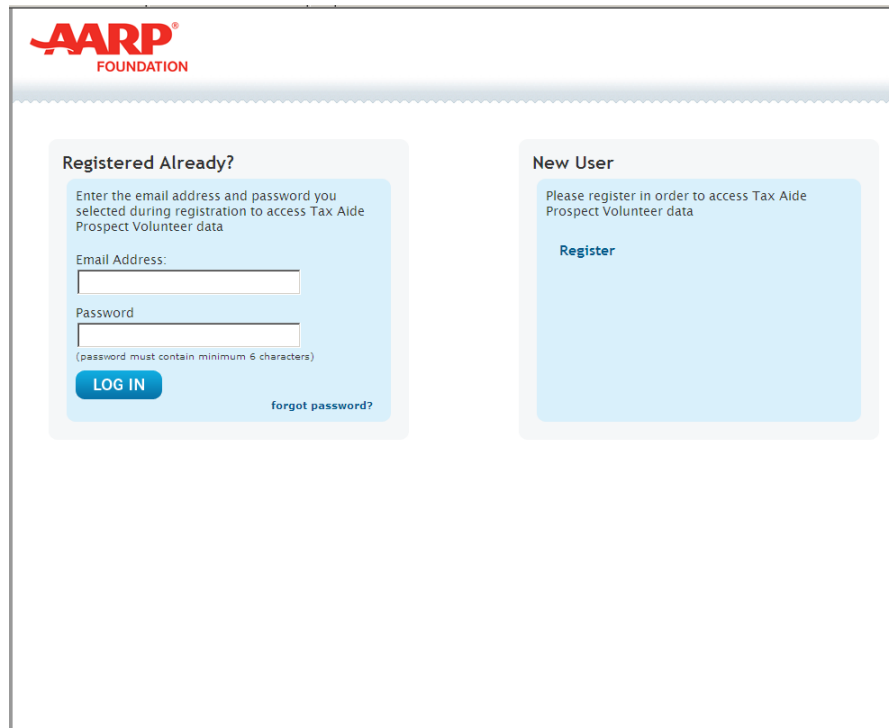
Once registration is completed, the following confirmation screen (Screen 6) is shown
Screen 6:



Screen 6 is a confirmation screen for the AARP Foundation. It features the AARP Foundation logo at the top left. The main content area is a light blue box with a white border. Inside, it says: "Your profile has been successfully created. Please click the 'Proceed to Login' button to login with your email address and password." Below this text is a blue button with white text that says "PROCEED TO LOGIN".

Clicking the “Proceed to Login” button navigates the user to the login screen (screen 7).
Note: please use the same email address and password created in the registration process.


Screen 7:



Screen 7 is the login and registration screen for the AARP Foundation. It features the AARP Foundation logo at the top left. The main content area is divided into two columns. The left column is titled "Registered Already?" and contains a light blue box with a white border. Inside, it says: "Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data". Below this text are two input fields: "Email Address:" and "Password:". The "Password:" field has a small note below it: "(password must contain minimum 6 characters)". Below the input fields is a blue button with white text that says "LOG IN". To the right of the "LOG IN" button is a link that says "forgot password?". The right column is titled "New User" and contains a light blue box with a white border. Inside, it says: "Please register in order to access Tax Aide Prospect Volunteer data". Below this text is a blue button with white text that says "Register".

Below confidentiality screen (Screen 8) is displayed once the email address and password are entered correctly from the login screen.

Screen 8:




Logged in as: Ronica Krishnan | [Log out](#)

CONFIDENTIALITY AND PRIVACY POLICY

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Clicking Cancel will take the user back to the Login screen. If the user clicks on 'I Agree' the following recruitment main page (Screen 9) will be displayed:

Screen 9:



Logged in as: **Arthur Welch** | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS


i Split State: **VA1**
State Coordinator **Arthur Welch**
State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**
ADS Email: **rfe001@gmail.com**
PVC: **Joyce Blanton**
PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: [Print Prospective Volunteers List](#)

Name	Phone	Email	i Submitted On	i Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7980	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

 Trusted sites


By zip-code Tax-Aide Prospective Volunteers (applicants) will be maintained in the queue of (DC/SC/PVC/ADS)

Note: If user has only “District Coordinator” in Tax-Aide Application then he/she will see only “Pending Approval From DC” and “In Progress” statuses of prospective volunteers in the queue.

3.0 Approve/Reject/On Hold/In Progress Prospective Volunteers


After successfully login to Tax-Aide Recruitment by users (DC/SC/PVC/ADS) the following recruitment main page (Screen 10) is displayed.

Screen 10:



Logged in as: Arthur Welch | [Log out](#)

AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

 Split State: **VA1**

State Coordinator **Arthur Welch**

State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**

ADS Email: **rfe001@gmail.com**



PVC: **Joyce Blanton**


PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status:

[Print Prospective Volunteers List](#)

Name	Phone	Email	 Submitted On	 Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7980	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

 Trusted sites

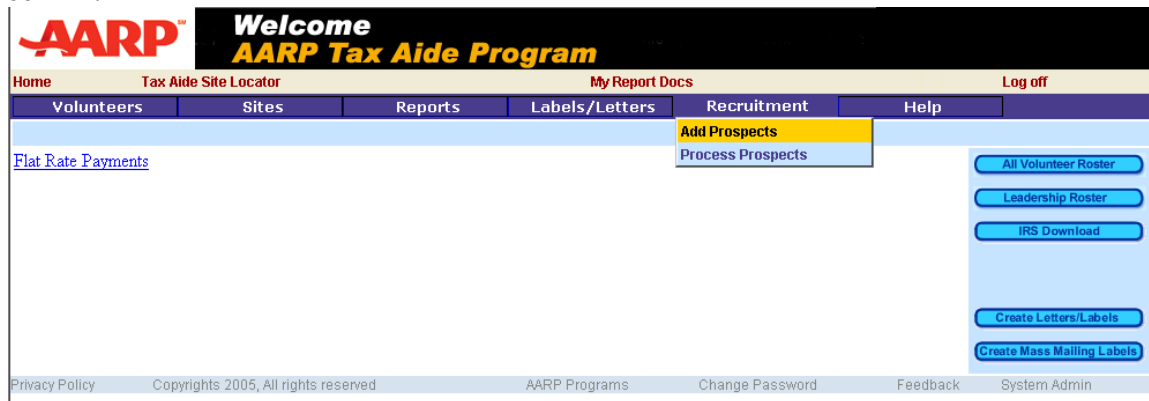
By selecting the DC is the dropdown list and review the prospective volunteer with any choices (approve/reject/on-hold/in-progress) the selected prospective volunteer will be approved/rejected/maintained in the queue and system will navigate user back to recruitment main page.

4.0 Login to VMIS (Intranet)

Login to the Tax Aide Program and proceed to the Recruitment tab. There will be two options available to the user.

- Add Prospects
- Process Prospects

Screen 12:



5.0 Add Prospective Volunteer through VMIS

Select the Add Prospects options from the Recruitment tab. The following screen
(Screen 13)



Welcome AARP Tax Aide Program

[Home](#) [Tax Aide Site Locator](#) [My Report Docs](#) [Log off](#)
[Volunteers](#) [Sites](#) [Reports](#) [Labels/Letters](#) [Recruitment](#) [Help](#)

Add Prospective Volunteer

Red titled fields are required.

Honorific First Name Middle Name Last Name Suffix Nick Name

Address 1:

Address 2:

Address 3:

City:

State:

Zip Code:

Phone: - - Ext.

Email:

Show Additional Prospective Volunteer Information

How can we best contact you? (max. 500 characters)

How did you learn about program?

Have you ever completed your own or someone else's tax return?

How comfortable are you using a computer?

Please tell us about your previous Volunteer experience/positions held? (max. 500 characters)

Please list your previous employers and job title

Name of the Employer	Job Title	
<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

Are you fluent in any language other than English?

When could you be available for help?

☐ Weekdays ☐ Evenings ☐ Weekends

What is your year of birth? (yyyy)

What is your ethnicity?

☐ American Indian or Alaskan Native ☐ Asian/Pacific Islander ☐ Black or African American ☐ White/Caucasian ☐ Hispanic/Latino
☐ Other

What is the highest level of education you have completed?

What is your current employment status?

Do you have any disability or chronic condition that keeps you from fully participating in work, school, house work or other activities?

In the last 10 years, have you been convicted of a crime? (A yes is not an automatic disqualification)

Anything else you would like us to know? (max. 500 characters)

The Add prospective volunteer screen will display. User must enter all mandatory fields marked in red. Note that more field options will be displayed when the ***Show Additional Prospective Volunteer Information*** link is selected. When done, click the Submit button.

Once the prospect is added, a prompt will be displayed on the Add Prospect Volunteer screen (Screen 14).

Screen 14:

Successfully added prospect volunteer: sonia khurana.

6.0 Process Prospective Volunteers

Select the Recruitment – Process prospects tab

Screen 15:

Process Prospective Volunteer - Search

Prospect Information

Please enter 'First Name, Last Name' OR 'Zip Code' OR 'Split State'

First Name:

Last Name:

Zip Code:

Split State:

OR

District Coordinator Information

Please enter 'First Name, Last Name, Email' OR 'District Coordinator ID'

District Coordinator First Name:

District Coordinator Last Name:

District Coordinator Email:

District Coordinator ID:

Search

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User can enter prospective volunteer information or district coordinator information to search for approved Prospective volunteers

Upon clicking “Search” approved prospective volunteers will be displayed.

If the “prospective volunteer” is in Konnects or VMIS database system will display the prospective volunteers list as shown in the below screen (Screen 16) **Screen 16:**

AARP Welcome
AARP Tax Aide Program

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

Search Results

Page 1 of 1 Previous | Next | First | Last

Go To Page

2 volunteers found.

ID	Name/Address	Seasonal Address
500049935	Aaron Doe 234 VMIS Rec Ter ASHBURN, VA 20147	234 VMIS Rec Ter VIENNA, VA 22182
500049941	Aaron Doe Jr. 1234 Brisbane Cir ASHBURN, VA 20147	26 Mills Rd VIENNA, VA 22182

2 volunteers found. Viewing last page of search results.

Go To Page

Page 1 of 1 Previous | Next | First | Last

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User can click on existing volunteer to update profile information or system will allow adding another volunteer even First name and Last name is same by clicking on Add Volunteer button.

Screen 17:

AARP™ Welcome AARP Tax Aide Program

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

Search Results Save Reset

[Add New Volunteer/Assignments](#) **Edit Volunteer & Assignment Information** [Edit Volunteer/Assignments](#)

VishTest02 Jeo Volunteer ID: 50-012-2930 Rematch
* 204 LEE ST Supervisor Name: ID: 111111111
GAITHERSBURG, MD 20877-2947 Split-State Code: MD1
* Tax-Aide Address <<In KONNEX but not a Member>>

Red titled fields are required.

Honorific: **Windows Internet Explorer** Information has been updated. OK

Middle Name: First Name: VishTest02 Nick Name:
Last Name: Jeo Suffix: -- Select --
Supervisor ID: Tax-Aide Start Year: 2010 Reason for Inactive Status:
Inactive: Inactive: Status:
Address Information Add Address
Start and End dates are required for Seasonal addresses.
Address Type: MAILING Tax Aide Address
Address: 204 LEE ST
Zip Code: 20877 - 2947 Validate County: Montgomery County District:
City: GAITHERSBURG State: Maryland Split-State Code: MD1
Start Date: e.g. mm/dd/yyyy End Date: e.g. mm/dd/yyyy

Done Local intranet 100%

Once approved Prospective Volunteer has been processed the volunteer ID will be provided in the popup message.